

Skill Area	Description	Director Skill Yes/No	Comments <i>Describe qualifications, provide evidence of skill application and any professional development undertaken (or proposed professional development that would benefit the Board in this area that you are interested in undertaking)</i>
Strategy	Leadership role within financial advice organization (Partner) Hold Masters in Business Administration	Yes	<ul style="list-style-type: none"> • Masters of Business Administration (MBA), graduated in 2024 with First Class Honors. • Involved in developing and delivering on strategic plans for financial advice business including setting goals and project managing major initiatives • I meet with the leadership team each month to discuss initiatives, issues etc
Finance	Formal qualifications in accounting and financial advice	Yes	<ul style="list-style-type: none"> • Bachelor of Accounting/ Bachelor Of Financial Planning, graduated in 2012 • Have worked in the accounting/banking/financial services industry since 2008 • Have sound financial literacy - Ability to read and interpret financials • Have been responsible with setting and monitoring budgets
Risk Management		Yes	<ul style="list-style-type: none"> • Financial advice industry has gone through a long period of change which has dramatically changed the industry • My role in our business requires me to recognize risk, develop a plan to reduce or manage the risk and implement this plan • Have completed a number of business tools including SWAT, Pestle analysis etc
Legal		No	<ul style="list-style-type: none"> • Financial advice is a highly compliant industry so I'm experienced in working within legislative requirements and understanding what is allowable under law
Executive management	Senior leadership role within financial advice business Have held multiple leadership roles in the past in financial advice and property industry	Yes	<ul style="list-style-type: none"> • I have been in management roles within the financial advice industry for the past 10 years • This includes recruitment, performance management, developing and implementing processes, promoting an inclusive culture etc
Media/Communications		Yes	<ul style="list-style-type: none"> • I have worked alongside my team around marketing/social media strategies • We have developed and implemented 6 -12 month plans around what we will target our marketing on and what outcomes we are chasing
Participation/ Grassroots Sports		No	
High Performance		Yes	<ul style="list-style-type: none"> • I have a track record of working and leading teams to achieve results • Skills include setting goals, providing continuous learning, allowing for collaboration, conflict resolution etc • I have a passion in optimizing processes and systems to enhance productivity and performance

			<ul style="list-style-type: none"> I have a strong focus on achieving measurable outcomes and driving continuous improvement.
Sport Administration		No	
Corporate Governance		Yes	<ul style="list-style-type: none"> I play a key role in managing relationships between our business, clients, stakeholders and referral partners The leadership team report on projects each quarter to the wide team for transparency and allow for feedback I currently lead the DEI Committee within our business
Medical/Health		No	
Information Technology		Yes	<ul style="list-style-type: none"> I have experience in using Microsoft Office (Word, Excel, Teams etc) as well as a number of CRMs
Commercial Fundraising/Sponsorship		Yes	<ul style="list-style-type: none"> I am involved in Financial Advice Association Australia (FAAA) Inspire committee which provides a framework to support women in the financial advice industry We organize events on a regular basis which includes fundraising and sponsorship from outside parties I work closely with our sponsors to ensure that our goals are aligned I have strong skills in relationship management
Policy		Yes	<ul style="list-style-type: none"> I have assisted in drafting various policies for our organization including conflict resolution, expense policies and complaint management. I currently lead the Risk Committee (ie Personal Insurance) and DEI Committee within our business